Teamwork Perspectives of a Remote
Team Manager

Interview by Charles Wasilewski

AN INTERVIEW WITH AGENCY OWNER ED GILLMAN:
"TEAMS SOLVE PROBLEMS TOGETHER"

Ed Gillman started his insurance agency, Gillman Insurance Problem Solvers (www.gillmanins.com) in 1993 in Alpharetta, Georgia. His 10-person agency focuses on small commercial accounts and personal lines, and has carved out niches in photographers, nonprofits and workers compensation. Gillman pointed out that one of the greatest impediments to teamwork is not being able to find the right team members. He cleared the obstacle using remote workers. Beth Wing, CIC, AU (see Teamwork Perspectives of a Remote Team Member interview in this issue) joined the agency as a remote insurance professional provided by Work At Home Vintage Employees (WAHVE.com), which provides remote outsourced staff to insurance firms.

1. What is your definition of successful teamwork?

Successful teamwork is, first of all, when everybody understands the goals and objectives and what their role is. The idea should be that folks understand what their job is but they also need to pitch in where needed. We've had a lot of that going on now. It seems like the busier you are, the more teamwork you need.

2. What business needs led you to consider a remote worker?

We're growing. We have a strategic plan in place to grow, but you need talent to do it. Frankly, I'm not necessarily the greatest "hirer" in the world in bringing people in to the office. I understand my limitations. WAHVE was a good viable solution. WAHVE actually vets the talent first, understanding what I was looking for and then matching us up and then doing it in an environment I'm actually pretty comfortable with, which is offsite, remote, self-motivated, self-directed folks.

3. What was your viewpoint on remote work prior to hiring a WAHVE remote worker?

We have been on TAM Online now for seven to eight years. I have arrangements in my office for flex schedules so folks can work from home when they need to. I travel a lot so I am always connected whether by cell or iPad, etc. I am more than OK with the idea of remote workers. You have to have the right kind of individual to make it work. That's the key. It's a huge benefit from the employee standpoint.

4. Did you have to overcome objections from other team members when you hired a wahve employee? If yes, what were the objections and were they ever validated?

No because I was already getting the max level of frustration in the quality of folks that were coming through. My other employees were not happy having to rely on unreliable people. So they knew a solution had to be found. I have a staff of ten people including two wahves. I incorporate people in my office in the hiring process. I think culture is almost more important than the work that's being performed. Because you can have great work but bad culture and it's going to end up not being a good situation.

5. How was the team dynamic affected when you added a wahve employee to the team? What kind of outcome did this produce?

It's an evolutionary process. In the beginning it was independent work and as we refined her roles and responsibilities it became more team oriented. I think you find people who understand weaknesses and strengths of all of the parties and they adapt.

6. Is your ability to manage teams different with the addition of a remote employee(s)?

It's better because I am able to determine and refine roles and responsibilities. One of my wahves, Beth Wing, actually handles all my VIP accounts. The other wahve, Debbie Danner, handles my small commercial business that's non-service-center. That's then given me the ability to move one of my internal employees into a pure sales role. And in turn, that's given me the ability to hire another person to dedicate to a niche in nonprofits and home health. It gives me some latitude and flexibility. I'm not sure you get that when you have everybody in one place at the same time. There's obviously been some drawbacks as well, but the advantages outweigh them.

It all goes back to the right talent. If you have the right people in the right job, and they're self-directed and motivated [it works]. What did President Ronald Reagan say? "Trust but verify." That's the WAHVE model. If you're an employer that's what you end up doing. You have to trust. Because if you don't trust that it's going to get done, it doesn't work for sure. You can't manage "wahves" as if they're sitting in the office. I don't care what kind of technology you have. You just look at the results. If I have to be a babysitter to my employees – I already have to be a babysitter to some of my clients – I'm in the wrong business. That's not what I want to be doing.

7. How were you able to make a personal connection with your wahve worker?

In the beginning you do a lot of talking on the phone. You learn about individuals in the good old-fashioned way, which is talking. But I do more than that. I actually bring them [the wahves] in once a year to Atlanta and they spend a day in the office. We actually go out and have dinner with the whole office and do an activity together. This year we did "whirly ball" [a basketball-like game in bumper cars], and then went out on our boat on the lake. The idea is just to get people to personally connect, and know that we're in this together. So we're not just this far-off voice in Denver or Tampa.

Teamwork Perspectives of a Remote *Team Member*

Interview by Charles Wasilewski

AN INTERVIEW WITH BETH WING, GILLMAN INSURANCE AGENCY: *"TEAMWORK IS ROUTINE"*

Beth Wing, CIC, AU, now in her fortieth year in the insurance industry, has worked in the agency business as an agent, account manager and customer service representatives as well as an underwriter. In 2010 she heard about a new firm, Work At Home Vintage Employees (WAHVE. com), which provides remote outsourced staff to insurance firms. After applying for a position, Beth became one of the first people in the insurance industry to join WAHVE and to work for an agency in a different state. Based in Florida, Beth serves as remote staff for Gillman Insurance Problem Solvers in Alpharetta, Georgia.

1. What is your definition of successful teamwork?

Successful teamwork breaks down to communication. Even though you may be working remotely, there are many ways to communicate. In my experience, the agency I'm working with does fairly good job of communicating. As a wahve, I am also involved in the agency meetings held every other week. Because I'm set up remotely and I have a phone extension as if I was sitting right there in the office, they just conference me in on the conference call with the rest of the group. I'm kept up to date for the most part of all the things that are going on that would relate to me. As far as the workflow and issues with clients and marketing and things going on in the industry, I'm kept in the loop that way. I do not feel as if I'm not part of the team at all. It's really not any different than if I was sitting there in the office.

2. Why did you decide to become a wahve?

I really was tired of commuting for 39 years. I work from my office in my home Florida most of the time. It works really perfectly because I can still be involved in the insurance industry because I am not ready to retire yet.

3. How was the team dynamic affected when you were added as a WAHVE employee? What kind of outcome did this produce?

Initially, Ed Gillman who I work with [at Gillman Insurance], introduced me to the whole office on a conference call. So I personally made sure that I built a relationship with each one of them. We wahves are supposed to be part of the solution, not part of the problem. We're supposed to assist those employees that are already there at the agency. We're supposed to come alongside and help them with the things they're having a difficult time completing because of their workload. I have been working with this agency for four years. So I'm just part of the group now.

4. As a WAHVE employee, how does working directly or indirectly with a team affect you differently than when working at the same location?

Sometimes it's kind of a double-edged sword. You are not distracted by things going on in the office. Therefore your time is well spent. Of course you can get distracted in your own house. The other side of it is I'm not always in the loop on everything. Some things I don't need to be in the loop about, because it's not affecting my work. Especially when company people come in to talk about what's going on. It's hard to be in on those meetings remotely because it eats up much of your shift. My coworkers keep me up to speed. I think you can be more productive as a wahve because you aren't distracted by the extraneous things going on in the agency.

5. Did your ability to make personal connections among team members change as a wahve employee? And to what degree?

I personally had no problem making personal connections with the team members I work with. In fact, we're all real good friends now. Mr. Gillman this past January flew [the other WAHVE worker from Colorado] and me from Florida to our agency function in Georgia for two days. I had met most of them before but now we all know each other. I don't see it as any different than working in the office. Sometimes the logistics have to be worked out.

6. Did you have to overcome objections from other team members when you were hired as a wahve employee?

I don't think there was any particular issue there. The staff in the office were really struggling with certificates of insurance. They were so happy that there was going to be someone to take this off their plate. There were really no objections from the team because they were happy [to have help].

7. Do you think being a wahve employee affects your ability to work successfully as a team? If so, how? And to what degree?

When you've never worked in a remote position before, you learn. We are fairly used to emailing and calling. This is not out of the ordinary. It just takes a little work. That's the mindset you have to take.

8. What are the benefits of working remotely?

It's the work-life balance. After you've been working in the insurance world for so many years, you get tired of the commuting. Now you're almost expected to take your work with you 24/7. You're always connected. After all that time, there comes a time where you need to make an adjustment. As WAHVE has pointed out, with the way the economy is, it's not like it used to be when you got to a certain age and you had all the money you needed to not work. I personally find satisfaction in helping some of the younger people who don't have the history understand all these issues and coverages in this industry.

There's No "I" in Team

by: Sharon Emek, PhD, CIC

We've all grown up learning about teamwork. As children, we had team sports and other team activities in school. Growing up our parents would remind us "It's about teamwork." Yes, we were also competitive but the overarching theme was working together as a team. In fact, when I visit with my grandchildren and it's time for them to clean up their toys, my daughter chimes in to her kids singing: "Teamwork, teamwork!"

Then we grew up and got a job. We sat in cubicles, worked for a department, were given a job description and did our job. A hierarchy prevailed, and too often we might hear: "That's not my job!"

The good news is that the teamwork concept we learned as children has now become in fashion in the work environment thanks to social networking and open sourcing. Forward-thinking employers have changed their organizational structure from departments to teams. They recognize that having people work as a team brings innovation, better problem-solving, better results and is more fulfilling.

In the last five years, I have experienced a dramatic change in how teams are created and how they work. As a director of ACT (Agents Council for Technology) I have participated in ad hoc teams to solve a problem working with people all over the country. As an agency principal, remote technology enabled some of my employees to work from home and still be effective members of their team. And

now as CEO of WAHVE, all of our 220 employees work from home and are active team members with others that they work with.

So teamwork is not about boundaries but about some basic principles:

1) What makes a team is the willingness of people to work together. Workers today are on teams that cut across locations, departments, and organizations. Work gets done when individuals and teammates help solve each other's problems, whether with information and perspective or with hands-on collaboration.

There are so many ways that teams work today. The traditional in-the-office model is merely one of them. And even office setups are changing. In more and more workplaces in our industry, teams that work together are not limited to a single location.

> *"A team is effective if it has the right people for the right reasons."*

Edie Weiner, a futurist with the firm Weiner, Edrich, Brown, noted that the importance of team interactivity is reflected in office setups: "We are increasingly moving from 'me' space – which refers to a more conventional work style that is centered around my cube or my office – to 'we' space – which refers to a more shared work style where interactive, collaborative and engaging work areas are prevalent."

Collaboration has to be encouraged in a company's culture. Proximity of workers in an office is no guarantee of teamwork.

2) The scope of the talent of an organization expands with the flexibility of the workforce. Diversifying outside traditional office boundaries yields ideas and resources that people in the office may not have thought of.

The practical effect is that solutions multiply, and people avoid dead ends. How common it is to hear someone say, out of both relief and excitement: "Why didn't I think of that?" The fact is that no

leader can think of or know everything. Yet, teams of people can come up with solutions where individuals cannot.

3) There are two kinds of teams: a) project- or problem-driven groups and b) structured sets of people responsible for business processes.

"What's the point?" That's often a good question to start with when forming a team or being asked to serve on a team.

A team is effective if it has the right people for the right reasons. All teams need leadership that works to make the team cohesive so it meets its purpose.

Our industry has begun to shift from hierarchical structures (departments aligned vertically) to horizontal structures (teams working side-by-side). For example, many insurance agencies today have a "personal lines team" (as opposed to a "personal lines department") where workers share responsibilities and step in for each other. It's seems a subtle difference, but it leads to the people focusing on the purpose (serving a customer or business partner) as opposed to serving the supervisor and saying "It's not my job."

When people work as teams, they see problems get solved for others. In turn, this gives confidence that they will have people to turn to for solving their next issue or problem.

Teams fail when that confidence is lacking, and a team member does not perceive that she or he can go to the team for answers.

The leader has an important role in making sure that the guidelines of the team are set up so they are relevant to the roles and responsibilities of each member of the team. More and more, team guidelines point to an open environment of collaboration.

This team dynamic does not happen by accident. It's up to the leaders of a firm to create the environment where teamwork can develop. That takes a leader – who probably has been around the industry from the time when structures were hierarchical – who adapts. It's up to the leader to be flexible and open to setting up guidelines and letting the team members perform.

It's a risk for some managers to give up the hierarchical structure. But they benefit. They can get better ideas, resources and performance. No leader, no matter how smart, has thought of every idea or answer. A culture of allowing for creativity brings fresh ideas. While technology can allow the ideas to be shared, what's needed even more is the permission for workers to share them.

4) Teams feed the desire to connect.

What drives teamwork is the need to connect and have a shared purpose. It is also a more-effective way to get the job done. Technology has transformed how teams function, enabling them to reach beyond the rigid borders of the office.

The boom in social networking reflects the fact that people want to reach those outside their immediate geographic area and office walls. Professionals want to connect to colleagues from the past who might be relevant today or in the future. (This has given rise to LinkedIn as a business-focused network, for example.) They want to connect to people who might bring ideas and resources; and they want to connect to co-workers in informal ways.

One last comment on teamwork: It takes the right attitude by leaders and employees. We have found that teamwork can thrive when our client companies have a solid team dynamic in place. Combined with positive leadership toward team building, it enables the team to function and deliver results.

About the Author

Sharon Emek, Ph.D. (Sharon.Emek@WAHVE.com) is founder and CEO of Work At Home Vintage Employees (www.WAHVE. com), a staffing company that provides remote outsourced workers to independent agencies and other insurance firms. WAHVE was named winner of the "Insurance Entrepreneurial Award" by the Insurance Innovation Alliance for its service providing insurance agencies, wholesale brokers, and carriers with skilled insurance retirees who work from home.

A Glimpse Inside WAHVE

WAHVE operates on the premise that workers can be strong individual performers and team members while working remotely. With more than 220 remote workers now serving clients using simple technology tools, we know this model works effectively.

Our company staff operates the same way, with more than a dozen staff working remotely from around the country and just a handful of employees working in our headquarters office. Together, the team supports those working remotely serving our clients from an office in their individual homes.

The WAHVE team uses virtual tools to collaborate and communicate. One tool is a message board

that serves as a place to ask for help and a "parking lot" of issues and ideas. When one of our WAHVE employees has a question, she can post it on the online discussion group. Others in the firm can see those breaking topics and answer them if they have information. To save this valuable information once it is developed, we have a wiki available to post information (on the company SharePoint site).

The (Un)hidden Agenda

Then, when the team has its twice-monthly conference call meetings those topics -- gleaned from the message board -- form the agenda. The tremendous side benefit of this tool in that both issues and solutions are shared.

Another team dynamic that is part of the WAHVE employee culture is what I call "leadership by issue." If one of our team members has an issue to research, new idea to pursue, or problem to resolve, she or he can take the reins, create a team and seek out the solution.

But she is not alone. While each employee has responsibilities to serve internal and/or external clients, all also have the opportunity to serve as a resource to others. We constantly work with each other when someone has an idea – an experience that improves company performance and employee job satisfaction.